

ASSIST Electronic Report Distribution System

Computer Based Training Guide

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Training Objectives

The purpose of this **Computer Based Training (CBT)** is to provide detailed instructions on how to access reports generated by various Department of Human Resources automated systems to include, but not limited to **the Alabama Social Services Information System (ASSIST)**. This training tool is designed to teach users how to use the Electronic Report Distribution (ERD) system. It can also be used to provide refresher lessons for specific ERD tasks at any time. Since ERD is strictly an output-generating system (not a data entry system), this CBT can be run using the real ERD system, as opposed to a "training" system with simulated data.

How to Use the CBT Software

The CBT software is a user-paced training tool that you can use any time. While the course is designed to walk you through the ERD system in a step-by-step lesson format, you may repeat any lesson when you feel the need for a refresher on a particular task. It is designed to run in conjunction with the ERD system. In other words, you will be running the ERD system and this CBT at the same time, switching between the two applications as instructed by the CBT. The CBT will explain how to perform a task, then instruct you to switch to the ERD system and perform the task yourself. You repeat the instruction/performance cycle until YOU decide you have mastered the skill, then move on to learn the next skill.

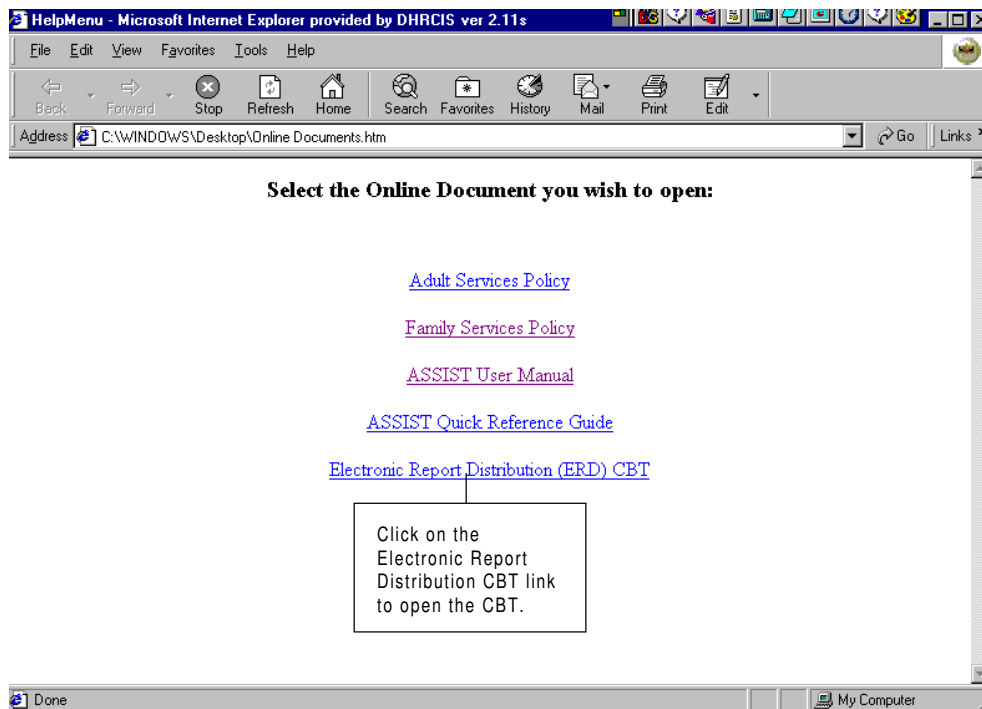
Starting the CBT

The ERD CBT is available through the Online Documents shortcut, which has been provided to you. This shortcut opens a list of links to several online documents. If the ERD CBT is not included on your Online Documents list, contact your ASSIST Mentor.

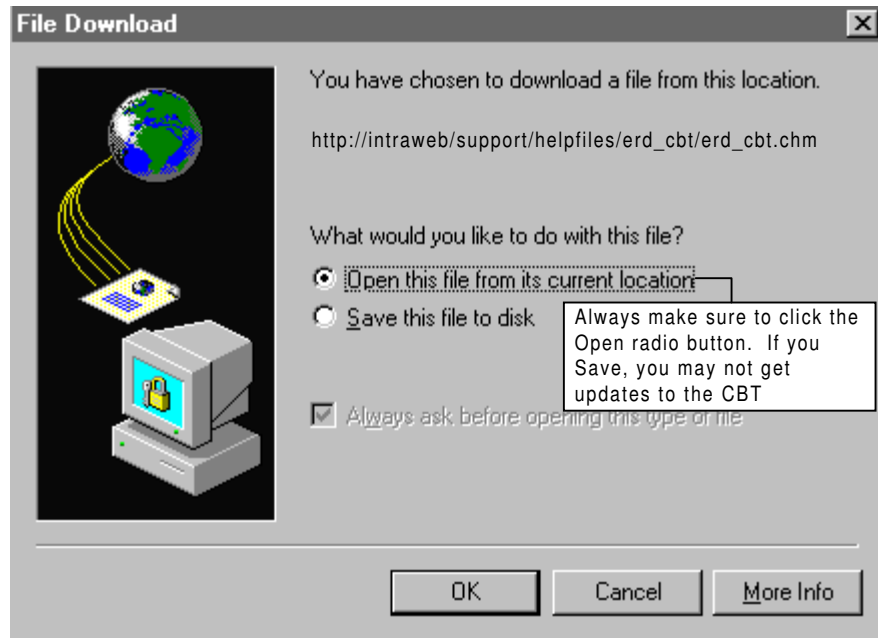
The Online Documents shortcut looks like this:



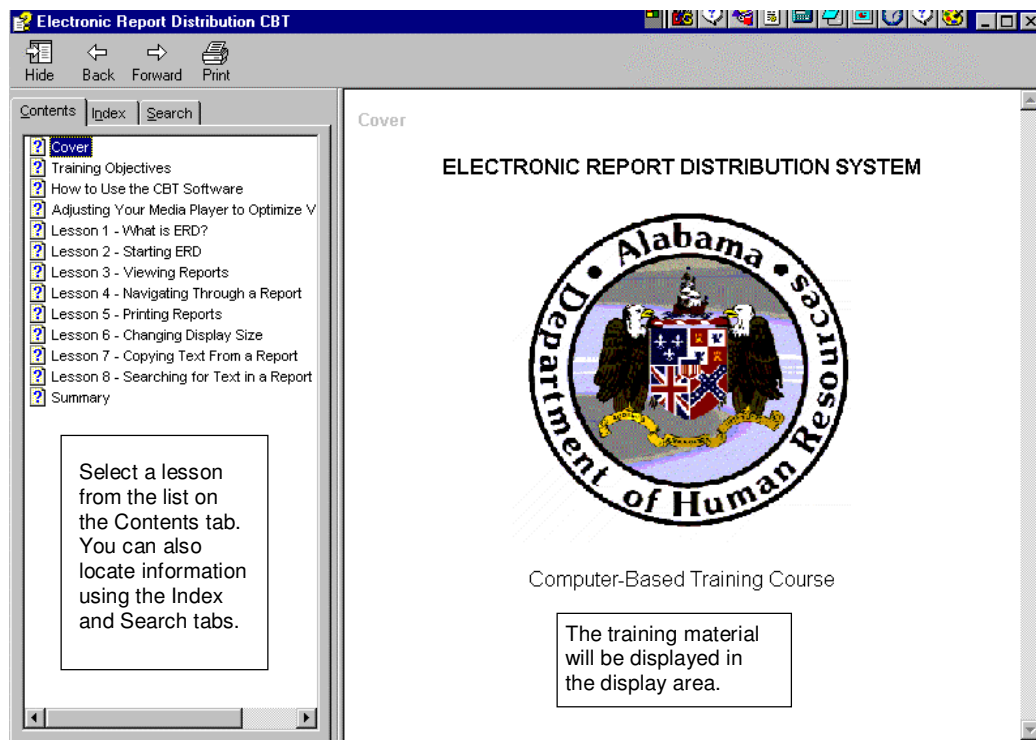
To open the Online Documents list, double click on the Online Documents shortcut. This opens the Online Documents list, which looks like this:



Click on the Electronic Report Distribution (ERD) CBT link to open the CBT. Before the CBT opens, the following dialog box will appear. This box gives you the choice of opening the CBT or saving it. You should always OPEN it. If you save it to your computer or to a local network drive, you may miss important updates to the CBT.

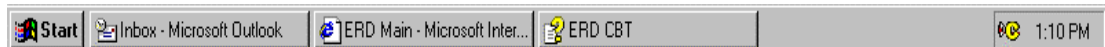


After selecting the "Open this file from its current location" radio button, click the OK button. The CBT will open to the main screen.



Switching Between the CBT and ERD

The easiest way to switch between two applications that are running in Windows 95 or later is to click the application buttons on the taskbar. Refer to the illustration below. It shows a **task bar** (usually at the bottom of the screen) with the **Start** button (always there), the **Microsoft Outlook Inbox button**, the **ERD Main button**, and the **ERD CBT button**. These buttons represent running software applications. Running applications may be minimized or stacked one behind another on the screen. Selecting one of these buttons maximizes the application (if it was minimized) and brings its application to the front of the stack. Throughout this guide, you will be asked to bring applications to the front by clicking on their task bar button.



1. If you do not already have ERD running on your computer, open it by double clicking on the ERD shortcut on your Windows desktop. The shortcut looks like this:



You should now have the buttons for **ERD Main** and the **ERD CBT** on your Windows taskbar. Since the ERD CBT was the last application opened, it is in the front of the stack.

2. Click on the **ERD Main** button. ERD should now be at the front of the stack.

You now know how to switch between open applications using the Windows task bar. Practice switching between **ERD Main** and the **ERD CBT** until you feel you have mastered this skill. You will be using this skill throughout this CBT course.

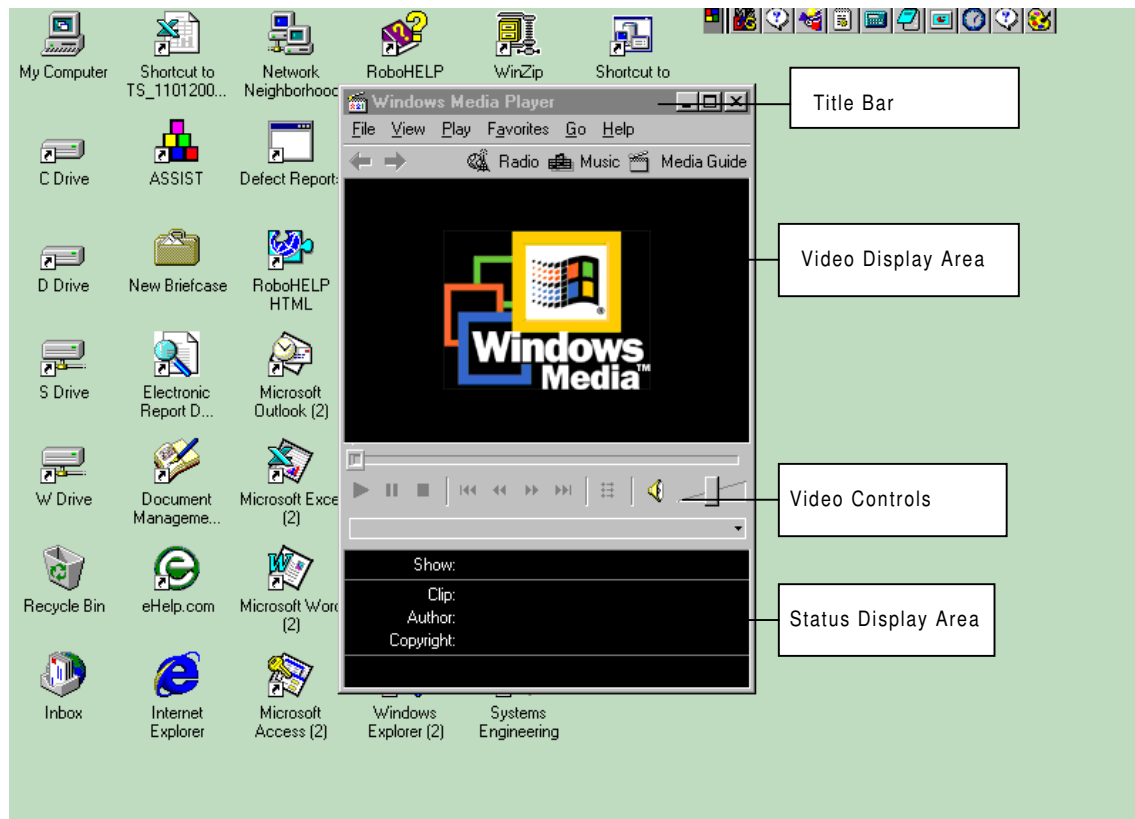
Throughout this CBT you will see **LET'S DO IT!** instructions followed by a **SHOW ME HOW** hyperlink. If you do not understand the written instructions, click the **SHOW ME HOW** hyperlink to play a short video clip of the instruction. After the clip stops, close its window to return to the instructions.

Adjusting your Media Player to Optimize Viewing Area

The video clips are displayed using the Windows Media Player. The default settings for the media player are most likely NOT set for the best viewing of this CBT's video clips. The clips should be viewed with the maximum size that allows you to see the entire clip. The default settings on your computer probably display clips in a very small window. The following instructions explain how to set your medial player to view the vidso clips in this CBT. You may want to print the following instructions to avoid having to switch back and forth between screens. If you need assistance making these adjustments, contact your LSA.

1. Open the Windows Media Player. To do this:
 - a. Click the Start Button.
 - b. Click Programs.
 - c. Click Accessories.
 - d. Click Multimedia.
 - e. Click Windows Media Player.

You should see something that looks a lot like this.

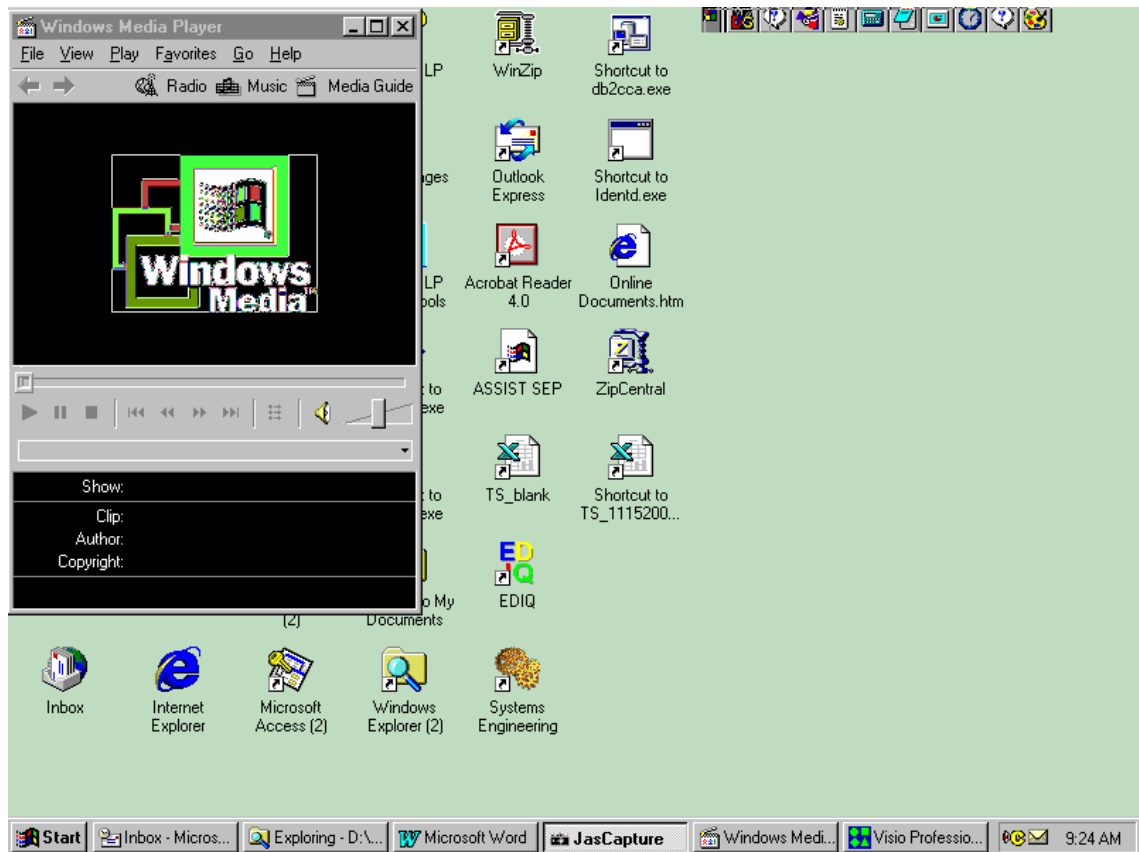


If your media player does not look exactly like the picture above, do not worry, some of the changes that need to be made may already be done on your computer.

2. Repositioning the media player. The media player needs to open from the upper left corner of the screen. You may note that the player opened in the center of the screen in step 1. If your media player is already in the upper left corner of the screen, you can skip this step.

- a. Place your mouse pointer on the Title Bar of the media player.
- b. Hold the LEFT mouse button down while dragging the mouse pointer to the upper left corner of the screen.
- c. Release the mouse button.

Your screen should look something like this:



3. Turn off any extra features that take up screen space. Make the following adjustments to the media player display options. Some may already be made on yours. If so only perform the ones that have not already been done.

- a. Click View from the Media Player menu.
- b. Click Minimal.

The media player should now look like this (Status display area is gone):

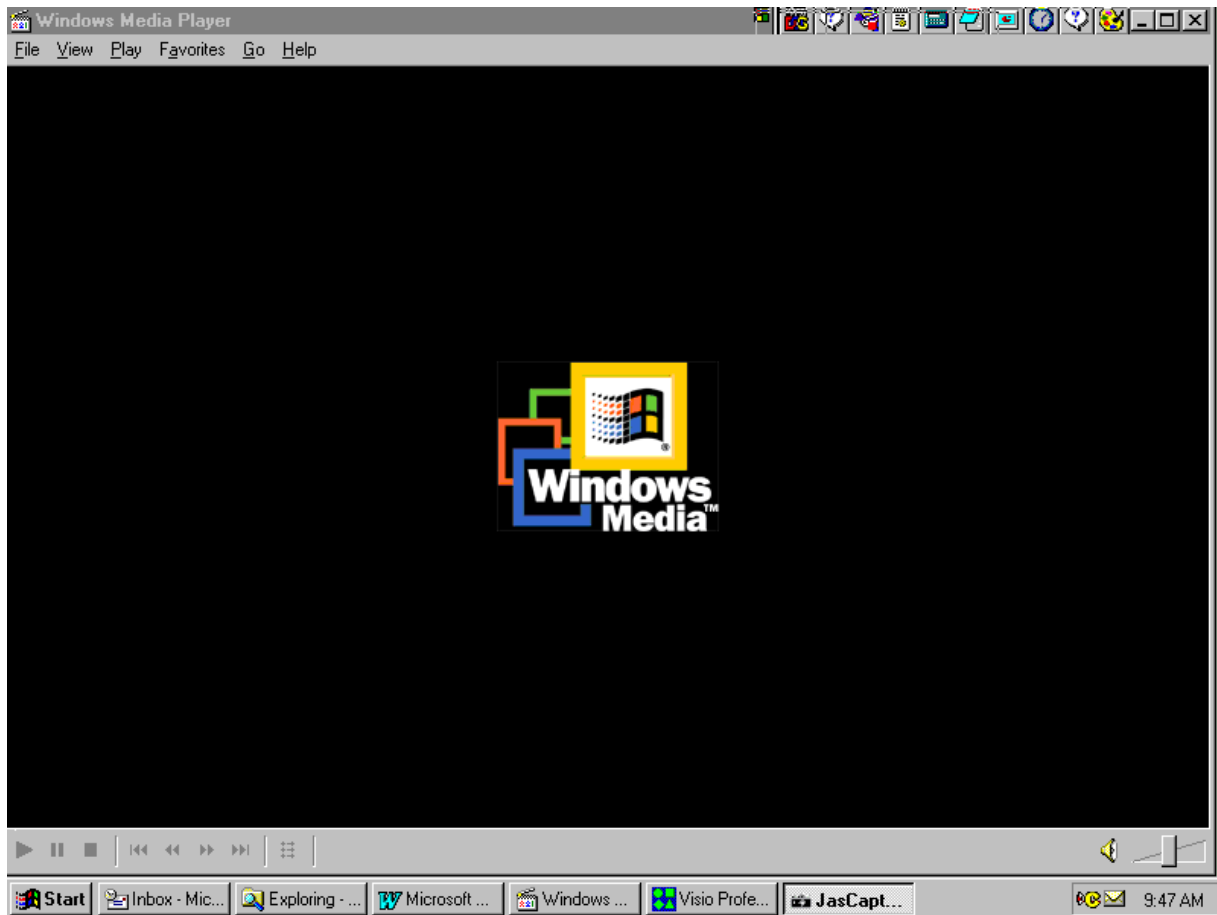


- c. Click View from the Media Player menu.
- d. Click Options.
- e. Click on the Player tab. (Player tab moves to front of tabs.)
- f. If the Autozoom check box is checked, click the box to un-check it. (The check box should NOT be checked.)
- g. Click the OK button.

The appearance of the Media Player does not change. Turning off the autozoom allows you to manually set the size at which the player opens.

4. Resize the Media Player to fill the screen.
 - a. Place the mouse pointer over the lower right corner of the Media Player window. The pointer should change shape and become a two-headed arrow.
 - b. While the pointer is a two-headed arrow, hold the LEFT mouse button down and drag the corner of the Media Player window so the bottom rests on the top of the task bar and the right side touches the right side of the screen.
 - c. Release the mouse button.

The screen should look something like this:



5. Close the Media Player window.
6. Re-open the Media Player using the procedure outlined in step 1. The Media Player should open to the size that you set in Step 4.
7. Close the Media Player.

Lesson 1 - What is ERD?

Throughout the course of a day, a great deal of data is entered into DHR Systems. This data provides information useful to managers at various levels of DHR - information such as how long does it take to complete a particular CA/N Initial Assessment or AANE Investigation. How long did it take to contact the person allegedly abused/neglected. Are there any intakes out there that have not moved through the system as expected.

One of the functions performed by the DHR System is the production of various batch reports that provide valuable information to workers, supervisors and managers in the DHR system. A batch report is produced at a certain frequency (daily, weekly, monthly or quarterly) as opposed to on demand. They are usually produced in the early morning hours (around 1 or 2 a.m.), when system use is lowest. This reduces the impact the production of these reports has on system performance (speed). ERD is the tool for viewing and, if necessary, printing these reports.

Lesson 2 - Starting ERD

ERD is a **web-based system**. That means that you do not have to load ERD on your computer. It is located on a server on the DHR Intranet. That is in**TRAN**et - NOT in**TER**net. The DHR Intranet is a closed system that can be accessed by computers connected directly to DHR servers. You can not access the DHR Intranet from home.

You DO need to have **Internet Explorer (IE) 5.0** or later to run ERD (all DHR computers are supposed to be loaded with IE 5.1). If you do not have IE 5.0 or later, contact your LSA. If you are not sure if you have IE 5.0 or later, contact your LSA. You should have an ERD shortcut on your Windows desktop. This shortcut points to the intranet web site for ERD. Double clicking on the ERD shortcut starts Internet Explorer, which then opens ERD.

NOTE: Internet Explorer is a web browser. A web browser is an application that displays various file formats used on the Internet. The same types of files are used in the DHR Intranet. Think of this like a word processor displaying a letter you typed. Other applications like a spreadsheet cannot display the letter, but a word processor can. Opening a web page with a web browser is like opening a letter with a word processor.

LET'S DO IT!

1. If you are continuing non-stop from the last lesson, you should already have ERD open. If not, open ERD by double clicking the ERD shortcut. The shortcut looks like this:



2. After ERD finishes opening, click on the ERD-CBT button on the task bar to continue the CBT.

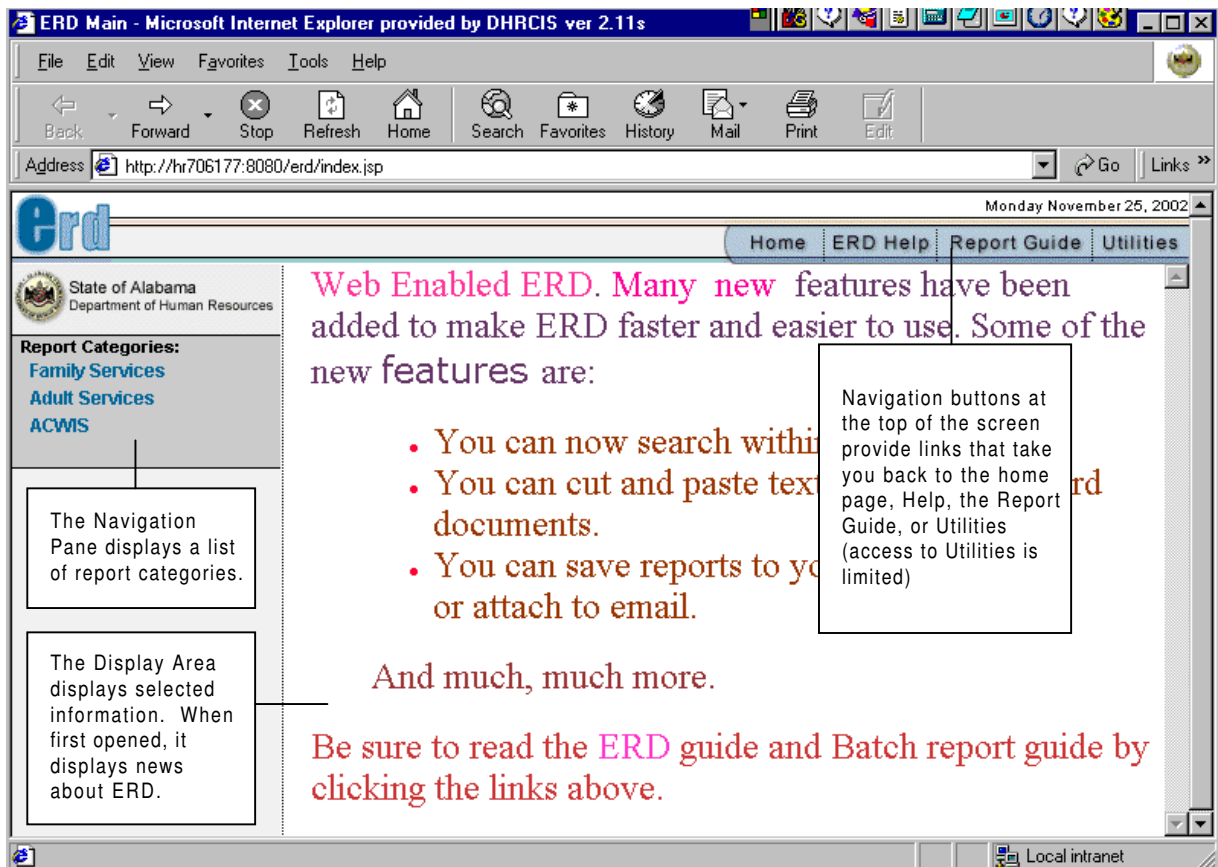
SHOW ME HOW to start the ERD application.

NOTE: If you do not have the shortcut, see your LSA.

Lesson 3 - Viewing Reports

If ERD is not already open, start ERD, then return to the CBT. If you do not remember how to do this, review Lesson 2.

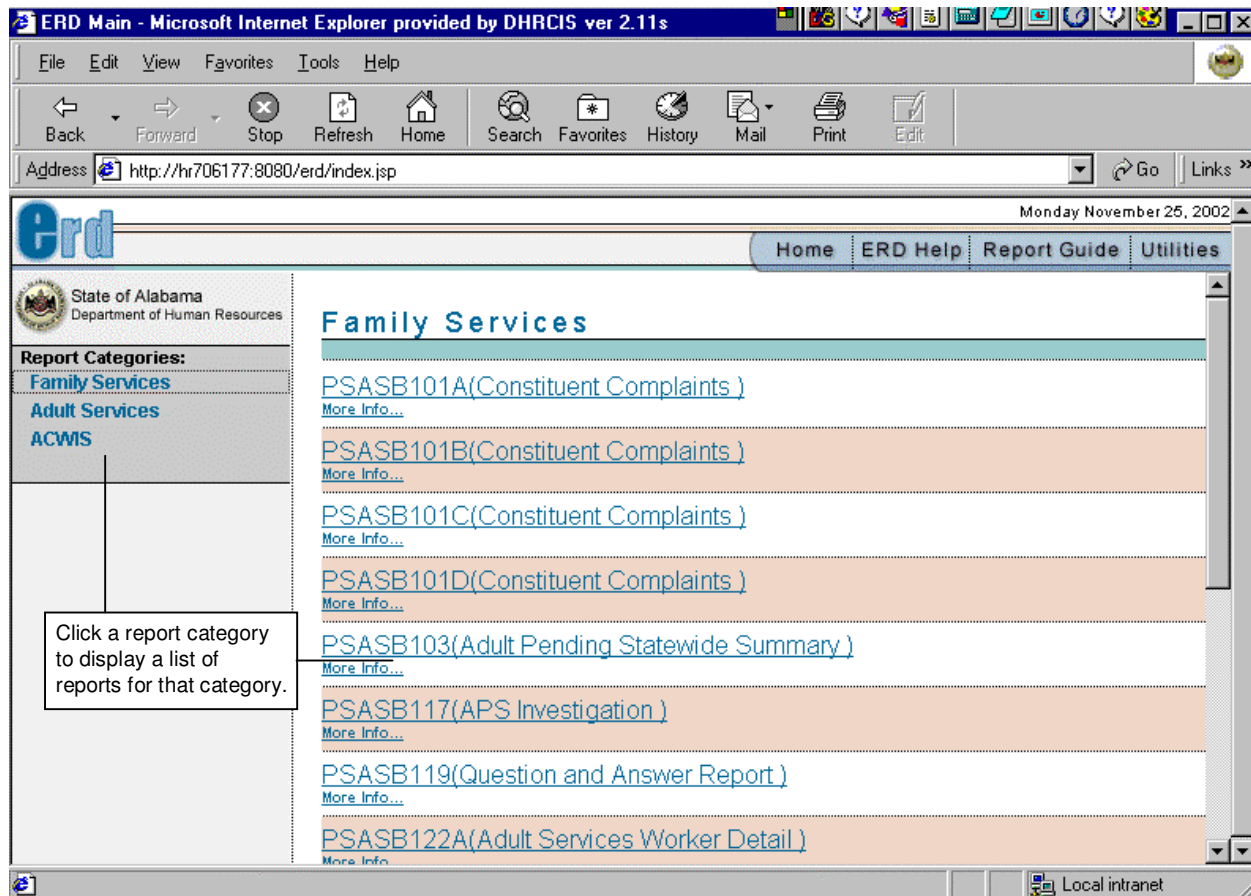
The ERD screen has a display area where information and reports can be displayed. Upon entering ERD, this display area contains information about ERD, such as updates to the ERD software or the addition of new reports. To the left of the display area is a **navigation pane**. This navigation pane contains a list of **report categories**.



Clicking a report category from the list displayed in the Navigation Pane will display a list of reports available for the selected category.

LET'S DO IT!

1. Click the Adult Services or Family Services link in the Navigation Pane.
2. Once the list of reports has been displayed in the Display Area, click on the ERD-CBT button on the task bar to continue the CBT.



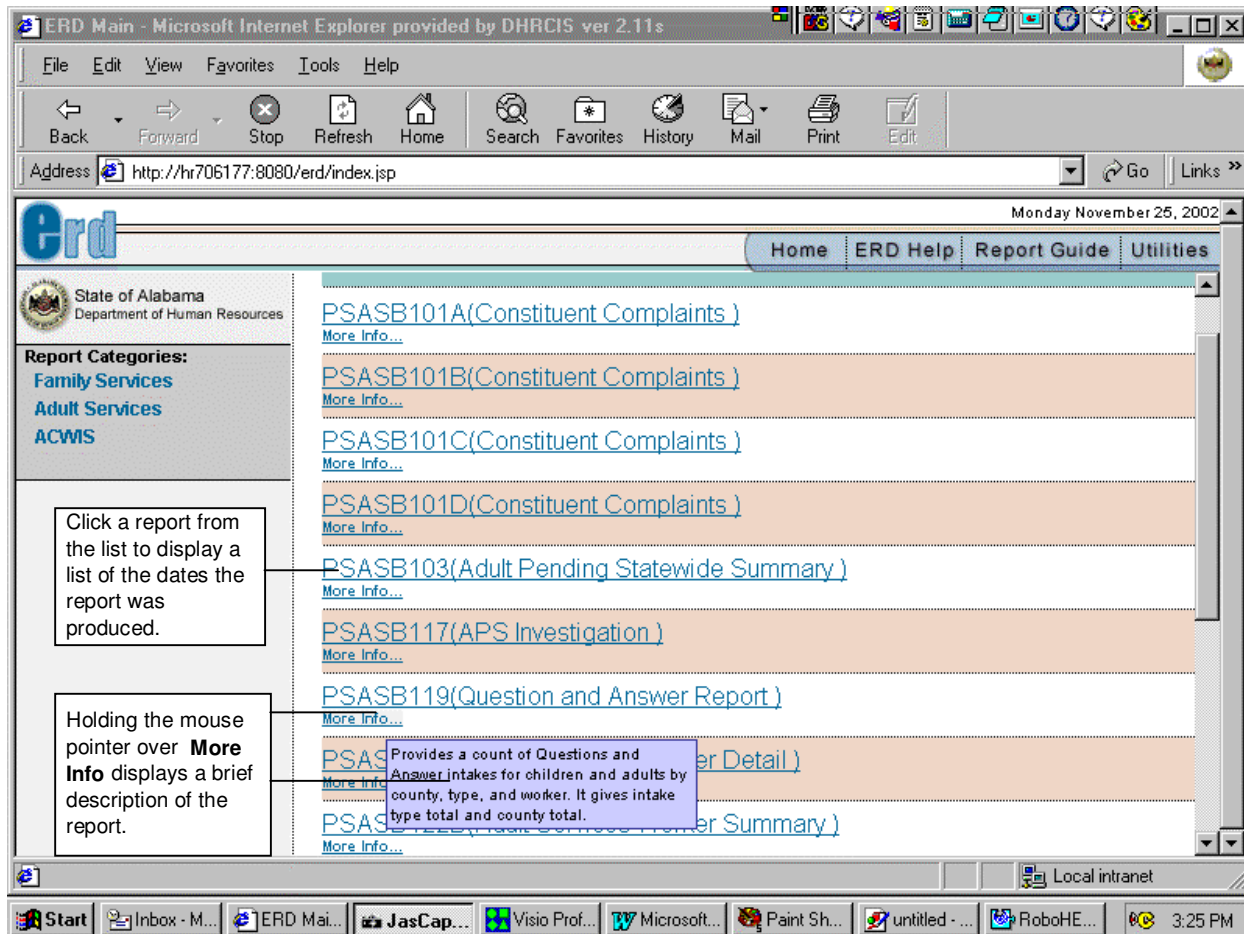
SHOW ME HOW to display the list of reports for a report category.

If you hold the mouse pointer over the **More Info** link for a report, a pop-up box will appear with a brief description of the report.

LET'S DO IT!

1. Go to ERD and find the Question and Answer report on the report list.
2. Point the mouse pointer on the More Info line for this report.
3. Once the pop-up box with the report description appears, click on the ERC-CBT button on the taskbar to continue the CBT.

SHOW ME HOW to view More Info for a report.



From the list of reports, click the report you want to view. This will display a list of dates the selected report was produced.

LET'S DO IT!

1. Go to ERD and click PSASB119 (Question and Answer Report) from the list of reports.
2. When the list of dates is displayed, click the ERD-CBT button on the task bar to continue the CBT.

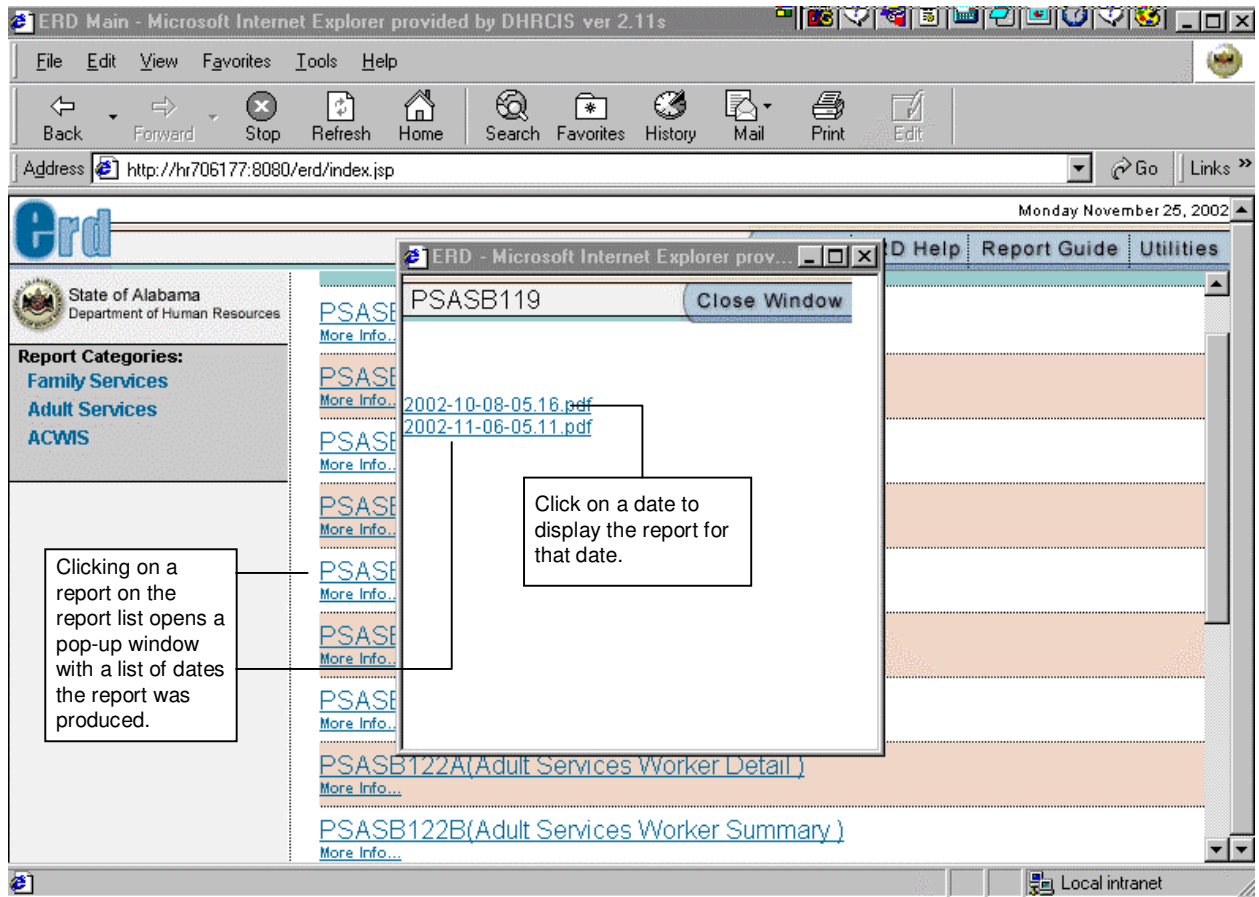
SHOW ME HOW to display a list of dates for a report.

From the list of dates, you can click a date to display the report produced on that date.

LET' S DO IT!

1. Go to ERD and click one of the dates displayed in the pop-up window.
2. When the report is displayed, click the ERD-CBT button on the task bar to continue the CBT.

SHOW ME HOW to select a report date and display a report.



Reports are displayed in Publication Document Format (PDF), which is displayed **using Adobe Acrobat Reader**. When you open a report, you will see the Adobe Acrobat Reader opening. The next lesson will teach you how to navigate through a report.

Lesson 4 - Navigating Through a Report

Most of the reports that you view in ERD have more than one page. This lesson will describe several ways to move from page to page in a displayed report. If you are continuing non-stop from the last lesson, you should already have ERD open with the **PSASB119, Question and Answer** report displayed. If not, open ERD and display this report. If you do not remember how to do this, repeat lesson 3.

The following picture shows an example

This tool allows you to (in order) go to the first page, go to the previous page, go to the next page, or go to the last page.

This tool allows you to review pages you have already viewed. The arrow pointing left goes back and the arrow pointing right goes forward.

REPORT IDENTIFIER: PSASB119 STATE OF ALABAMA FREQUENCY: MONTHLY
RUNDATE: 06/05/2002 12:49 DEPARTMENT OF HUMAN RESOURCES PAGE: 1
ALABAMA SOCIAL SERVICES INFORMATION SYSTEM
QUESTION AND ANSWER SUMMARY FOR-MARCH 2002

COUNTY: Baldwin	NUMBER OF INTAKES
TYPE: Adult Facility Information	
WORKER: SARAH N. HASTIE	1
TYPE TOTAL: 1	
TYPE: Adult Services	
WORKER: CATHRYN E. CRAWFORD	2
SARAH N. HASTIE	6
CAROL A. MCKNIGHT	1
TYPE TOTAL: 9	
TYPE: Child Care Information	
WORKER: SARAH N. HASTIE	1
CAROL A. MCKNIGHT	1
TYPE TOTAL: 2	

This tool allows you to go to the first page, previous page, next page, or last page. The page indicator in the center shows which page you are currently viewing and how many total pages are in the report.

LET' S DO IT! Use the tool shown below to go to the next page, the last page, the previous page and the first page until you feel you have learned this skill, then return to the CBT.



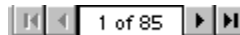
SHOW ME HOW this tool works.

LET' S DO IT! Use the tool shown below to review the pages you viewed in the previous exercise until you feel you have learned this skill, then return to the CBT.



SHOW ME HOW this tool works.

LET' S DO IT! Use the tool shown below to go to the next page, the last page, the previous page and the first page until you feel you have learned this skill, then return to the CBT.



SHOW ME HOW this tool works.

Lesson 5 - Printing Reports

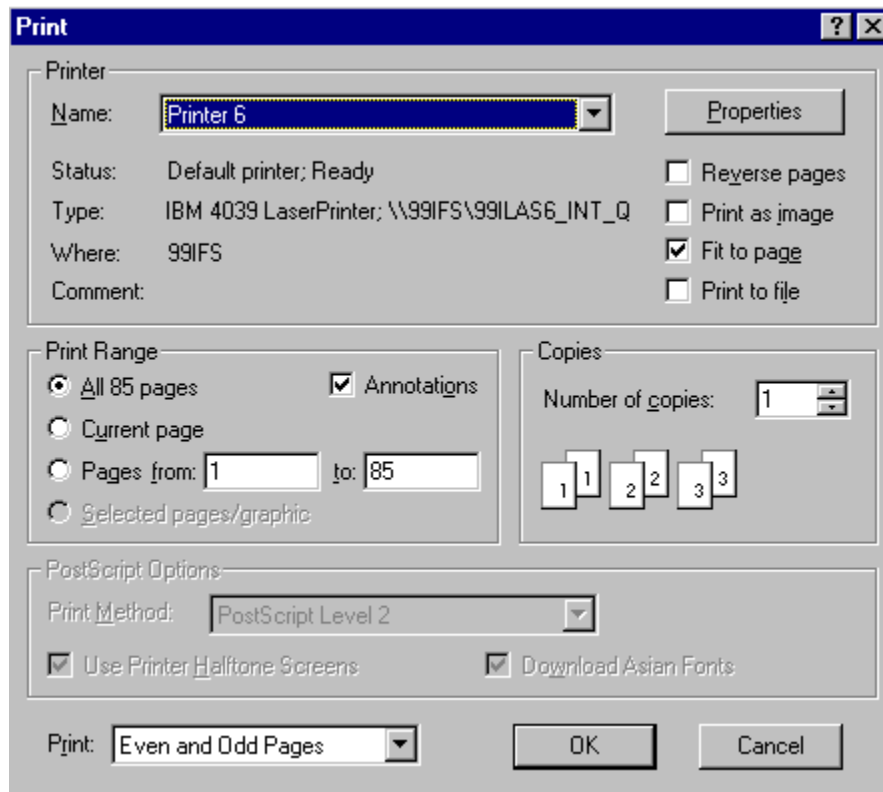
There will probably be times when you need to print a report or part of a report. The idea of having a system like ERD is to minimize the amount of paper reports generated because you can always pull a report back onto your screen at any time. On those occasions when a printed report is a must, ERD provides the capability to meet this need.

One thing to be careful about is printing more than you want or need. Many of the reports generated by ASSIST are hundreds of pages long. This is because ASSIST generates reports for the entire state. If you want only a portion of the report (only your county or only a specific page), you can print just the portion you want.

To print the entire report, click the printer button on the Internet Explorer tool bar. This button is shown below.



Clicking that button will open the Print pop-up window.



Print

Printer
Name: Printer 6 Properties
Status: Default printer; Ready ☐ Reverse pages
Type: IBM 4039 LaserPrinter; \\99IFS\99ILAS6_INT_Q ☐ Print as image
Where: 99IFS ☒ Fit to page
Comment: ☐ Print to file

Print Range
☒ All 85 pages ☒ Annotations
☐ Current page
☐ Pages from: 1 to: 85
☐ Selected pages/graphic

Copies
Number of copies: 1
1 1 2 2 3 3

PostScript Options
Print Method: PostScript Level 2
☒ Use Printer Halftone Screens ☒ Download Asian Fonts

Print: Even and Odd Pages OK Cancel

To print the entire report, make sure the All ... Pages radio button in the **Print Range** group box is selected, then click the **OK** button.

To print a range of pages, you will need to:

1. Look through the report and use the navigation tool with the page number to determine the first page and the last page you want printed.
2. Use the Internet Explorer print button to open the **Print pop-up window**.
3. Select the "Pages from:" radio button in the **Print Range** group box.
4. Enter the number of the first page to print in the "From:" field and enter the number of the last page in the "To:" field.
5. Click the **OK** button.

LET' S DO IT!

1. If you are continuing non-stop from the last lesson, you should already have ERD open with the PSASB119, Question and Answer report displayed. If not, open ERD and display this report.
2. Print JUST YOUR COUNTY' S portion of this report using the procedure outlined above. When you have completed this, click on the ERD-CBT button on the task bar to continue the CBT.

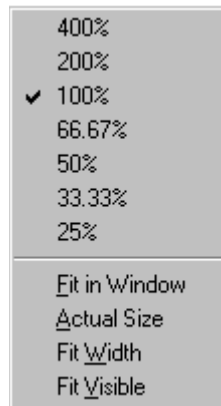
SHOW ME HOW to print a range of pages from a batch report.

Lesson 6 - Changing Display Size

Depending on the size of your monitor, it may be difficult to read reports that ERD displays at the default size. You can use the **Zoom Tool** to change the size of text displayed on the screen. It is important you understand that the text is only **DISPLAYED** larger or smaller. The actual size of the text in the file is not affected. The **Zoom Tool** also does not affect the size of the printed report's text. The **Zoom Tool** is shown below.



By default, the **Zoom Tool** is set to INCREASE the size of the text (or Zoom In). If you want to DECREASE the size of the text (or Zoom Out), you can select the **Zoom Tool**, then right click on the report. The following pop-up menu will be displayed.



You can select the size you want the report displayed by clicking the zoom percentage from this menu. The selected size will have a check mark displayed next to it. You can select the actual size of the report by selecting **100 %** or **Actual Size**. Larger percentages increase the size, lower percentages decrease the size. **Fit in Window** sizes a page of the report so the entire page fits on the screen. **Fit Width**, adjusts the size so the entire page can be seen from one side to the other, but not necessarily from top to bottom. **Fit Visible** adjusts the size of the page so the MARGINS of the page fit the screen. This gives you a slightly larger size than Fit Width.

LET' S DO IT!

1. If you are continuing non-stop from the last lesson, you should already have ERD open with the PSASB119, Question and Answer report displayed. If not, open ERD and display this report.
2. Use the Zoom Tool to adjust the size of the report to each of the sizes on the right click pop-up menu.
3. When you have done this, click the ERD-CBT button on the task bar to continue the CBT.

SHOW ME HOW to adjust the size a report is displayed using the zoom tool and the right click pop-up menu.

Lesson 7 - Copying Text From a Report

You may have noticed that the default tool when you display a report is the **Hand Tool**, which allows you to move the page around, but not select anything. **The Text Select Tool** allows you to select text in a report so it can be copied and pasted into other documents. The **Text Select Tool** is shown below.



With this tool selected, you can select text the same way you do in a word processor by holding the mouse button down while dragging the mouse across the text. Once the text is selected, you can copy it using the **Copy tool** (shown below) or right clicking on the selected text and clicking Copy from the pop-up menu (shown below).



After the text has been copied, you can open another application (such as Microsoft Word) and paste the text into that application using the Paste tools provided by the other application.

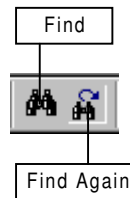
LET' S DO IT!

1. If you are continuing non-stop from the last lesson, you should already have ERD open with the PSASB119, Question and Answer report displayed. If not, open ERD and display this report.
2. Use the Text Select Tool to select and copy the first page of the report, then open Microsoft Word and paste the text into a Word document. When you have done this, click the ERD-CBT button on the task bar to continue the CBT.

SHOW ME HOW to copy text from a report and paste it into a Word document.

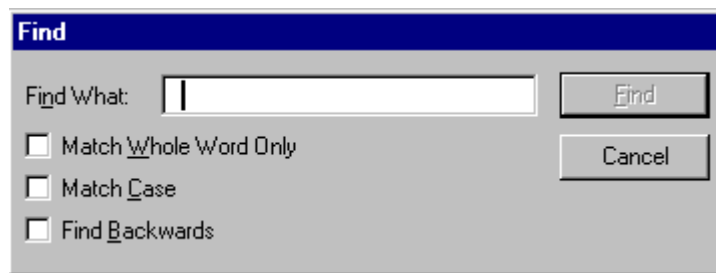
Lesson 8 - Searching for Text in a Report

ERD allows you to search for text in a report using the **Find** tools. There is a wide range of uses for this functionality. One possible use for these tools is to find where your county's portion of a report begins by searching for your county's name. The **Find** tools are shown below.



When you click on the **Find Tool**, the pop-up box shown below will appear.

1. Enter the text you want to find in the **Find What** text box.
2. If the text you are searching for is part of another word (like Dale - which is part of Lauderdale) you should click **the Match Whole Word Only** check box to keep the search from stopping at words you do not want.
3. **The Match Case** check box can be used when you KNOW that the capitalization of the words is used consistently in the report.
4. Checking **Find Backwards** will reverse the search so the search is performed toward the front of the report rather than the back.
5. Once you have set up the search parameters the way you want, click the **Find** button. The search will stop at the first occurrence of the text you want to find. If you want to continue the search without changing any parameters, click the **Find Again** tool.



LET' S DO IT!

1. If you are continuing non-stop from the last lesson, you should already have ERD open with the PSASB119, Question and Answer report displayed. If not, open ERD and display this report.
2. Use the Find Tools to locate the beginning of your county' s section of this report. When you have done this, click the ERD-CBT button on the task bar to continue the CBT.

SHOW ME HOW to search for text in a report.

Summary

In this CBT you have learned how to produce reports based on data derived from the ASSIST system. You learned how to navigate through a report and how to print all or part of a report. You learned how to copy text from a report and paste it into another document. You also learned how to search for text in a report.

You are encouraged to review any part of this CBT any time you feel the need to refresh your skills in a certain area.